**Client Avatar Worksheet**

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**Introduction**

When you create a customer avatar, you're actively choosing who you want to work with, so your description here needs to be of people you want to attract to your business. These may or may not be the same people you've coached or worked with in the past.

**What to Include**

There are 4 major components to a customer avatar:

1. Demographics, Social & Interests
2. Frustrations & Fears
3. Wants & Aspirations

As mentioned in the Signature Offer Workbook, there is a lot of research you can do to refine your customer avatar, but **don’t wait - you can create your first draft of an avatar NOW.** Having a draft Customer Avatar can help your research process because you will be identifying areas you are not sure of and that require additional research.

The idea with a customer avatar is to start broad and end up with a very specific profile. So to begin, think of a broad segment that your client belongs to.   
For example *female executives* or *parents.* Then give your person a name, *Exec Julie* or *Parent Tom*

**Instructions**

Brainstorm answers to the dot points in each section, then create a “story” or profile of your customer in the shaded boxes. We have given you two examples in each section as a guide

To get started you can think of a client you already have and look up their LinkedIn profile, Facebook page or Instagram account to see who they like and follow and what they comment on.

Then from there just let your imagination do the work. Visualise that person standing in front of you, or having a conversation with you.

**1. Demographics, Social & Interests**

* Age:
* Gender:
* Marital status:
* Number/age of children:
* Location:
* Occupation / job title:
* Annual income:
* Level of education:
* Social media platforms they are on:
* Brands or influencers they follow or engage with:
* Where do they get information (list books, blogs, websites, forums, conferences & events):
* What problem do they have?
* What sentence would they say?

Once you have brainstormed all the detail, compose a short description of your sample customer as follows.

**Sample Profile**

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| --- |
| Demographics  Julie is a 50 yr old, female, married with two secondary school children who lives in London.  She is an HR manager for a large business with an annual income of 65K GBP. Julie is university educated and undertakes regular further studies and professional development within her organisation.  Social  Julie has a LinkedIn profile and is a regular user looking up the profiles of potential employees, stays connected with recruiters and is a member of LinkedIn industry groups. Personally she is also active on Facebook keeping in touch with friends.  Interests  Julie follows Simon Sinek, Christy Wright, Jon Gordon, Tim Ferriss and Carson Tate. She is a member of the UK CIPD Association and attends the annual HR conference in London. ulie subscribes to HR Magazine UK and participates in London HR forum  Problem  Julie is bored and frustrated with her job. She wants to leave her job and do something for herself.  Statement  *I love my job and the team I work with but I’ve been doing it for 20 years now and I need a new challenge.* |

**Your Customer Profile**

|  |
| --- |
| Demographics  Social  Interests  Problem  Statement |

**2. Frustrations and Fears**

Now think about all the things your customer is trying to move away from. What are the things or feelings in their lives that cause them frustration. What are their fears? Some questions you can ask to uncover more insights are as follows:

* What keeps them up at night?
* What annoys and/or frustrates them?
* What challenges do they face on a daily basis, big and small?
* Who or what is standing in the way of their success and happiness?
* What are some key systems in their life/job that frequently fail?
* What’s something they’re forced to interact with that’s difficult to manage or to understand?
* What feature (or lack of features) do they regularly complain about in related products or services?

Here’s an example of some of our avatar’s fears and frustrations:

**Sample**

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| **Frustrations and Fears**  Julie is frustrated at the lack of career opportunities for women over the age of 50. She is fearful that she might be overlooked when it comes to promotions as the company increasingly employs younger people. She is worried if she leaves she will be too old to start something new or get a new job with a different employer.  She worries about money and having enough to retire one, which again promotes anxiety about her career. She is tired all the time and sick of working for other people but doesn’t know how to fix the problem. |

**Your Customer Profile**

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| --- |
| **Frustrations and Fears** |

**3. Wants and Aspirations**

Now look at the positive things in your customer’s life. What are the things they like to do, or the things they are happy with in their loves. What are their dreams for the future?

* What do they want for themselves?
* What do they want for the people around them (family, friends, co-workers, employees, etc.)?
* What do they aspire to be?
* What goals have they set for themselves?
* What values do they hold dear?
* What are their “secret” desires?
* What are their top 3 values?

**Sample**

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| --- |
| **Wants and Aspirations**  Julie wants & desires   * To have better work life balance and control of her time * To help people who are passionate about what they want to do * Learn something new, train or help people in a different way * To be re-energised and feel like she is making a real difference in people’s lives * To be valued for her experience and expertise * To have financial security |

**Your Customer Profile**

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| --- |
| **Wants and Aspirations** |